

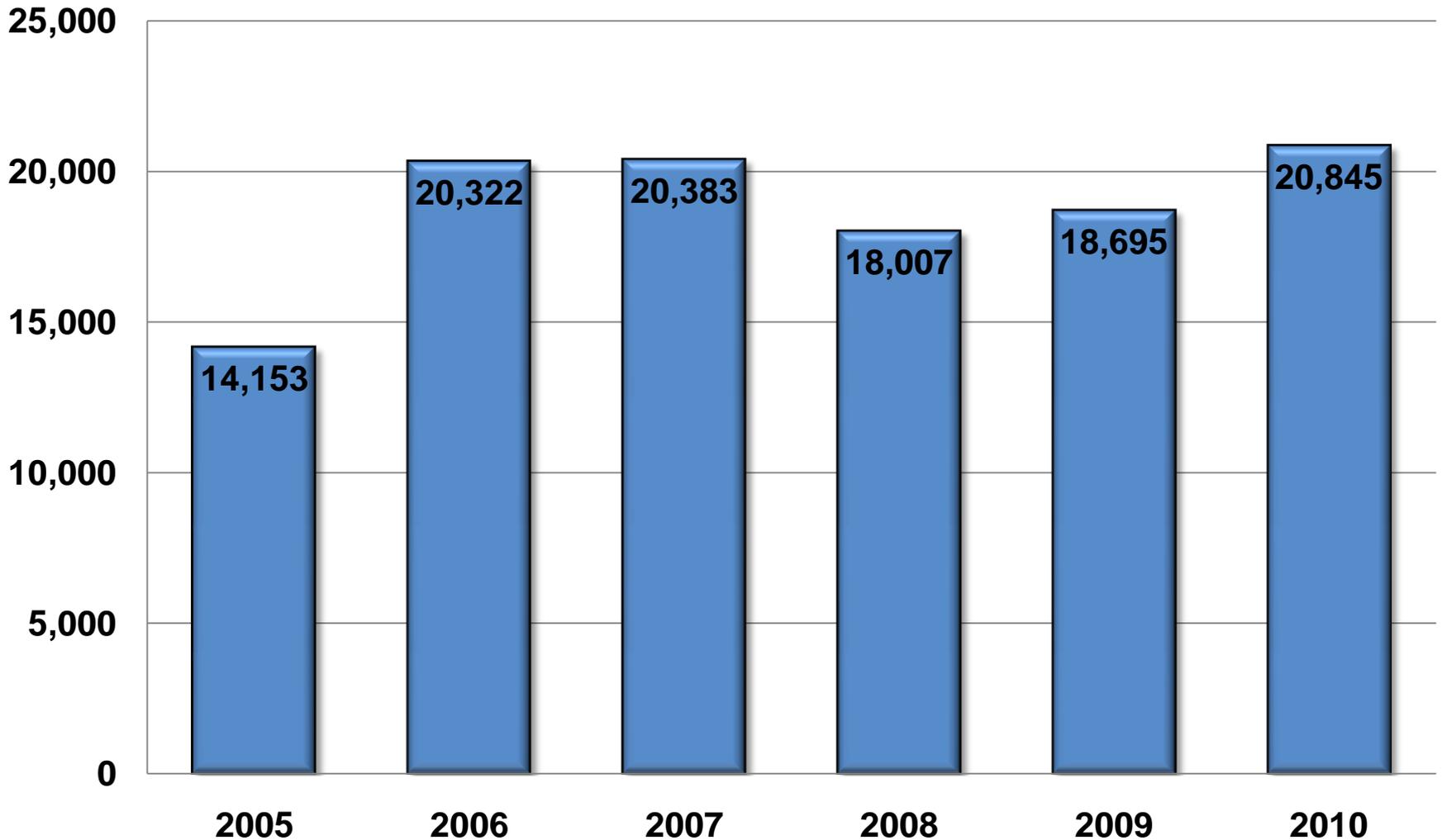
INDIANA

Accelerate Your Business

“Government does not create jobs; it only creates the conditions that make jobs more or less likely.”

Governor Mitchell E. Daniels, Jr.
State of the State Address, January 18, 2005

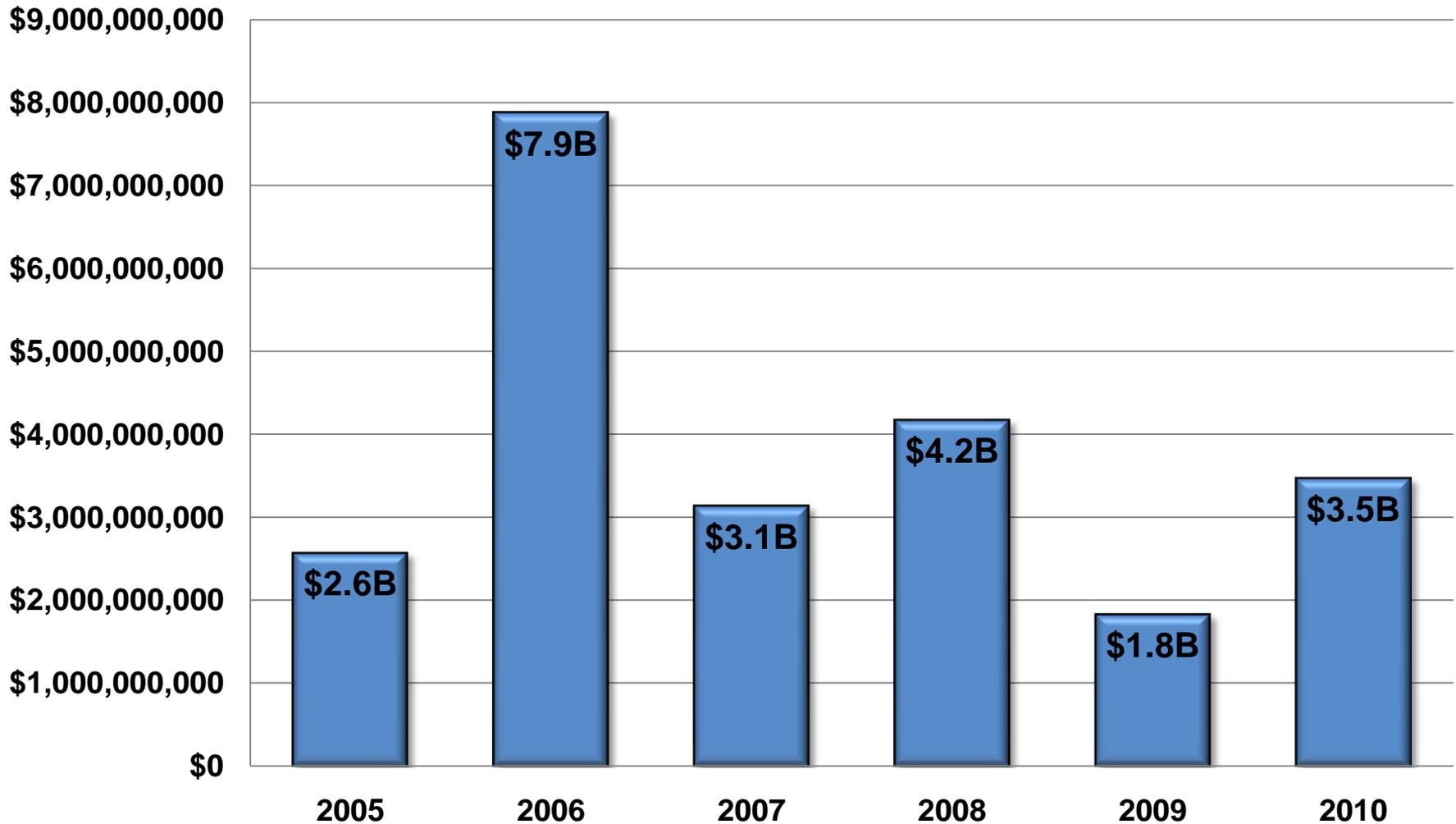
Private Sector Job Projections Year-to-Date



• As of 12/01/2010



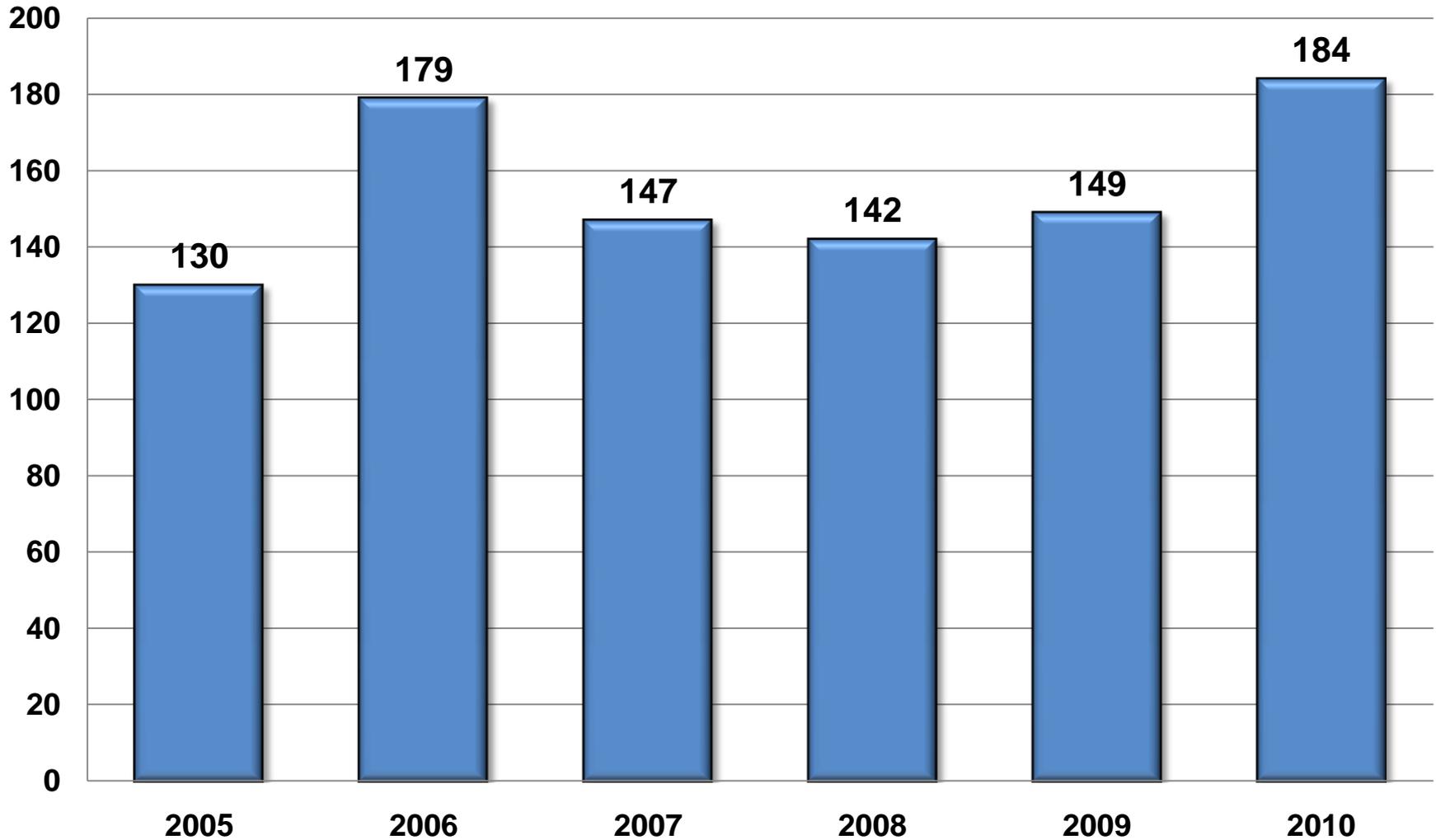
Private Sector Investment Projections Year-to-Date



• As of 12/01/2010



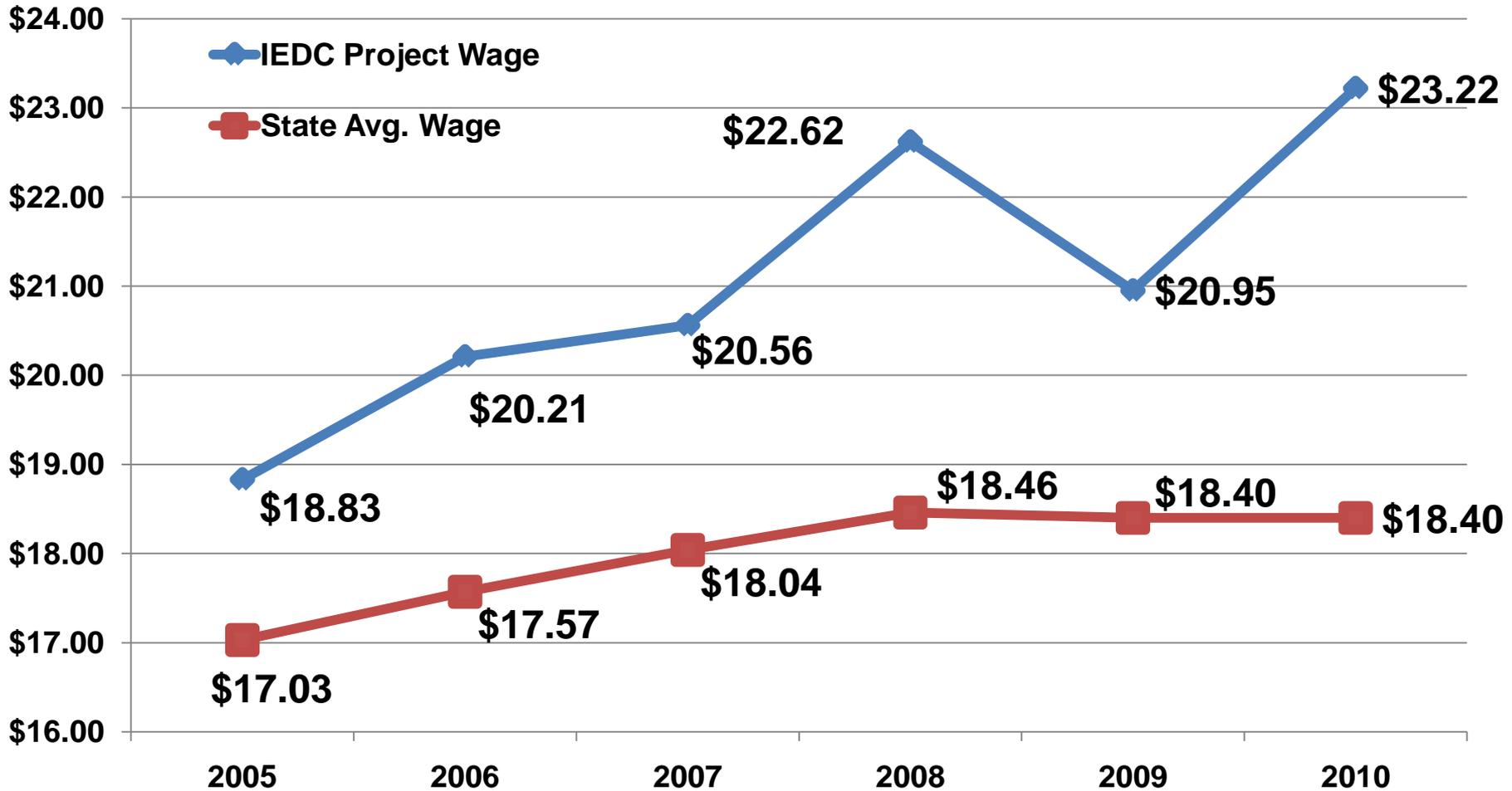
Total Competitive Projects Year-to-Date



• As of 12/01/2010

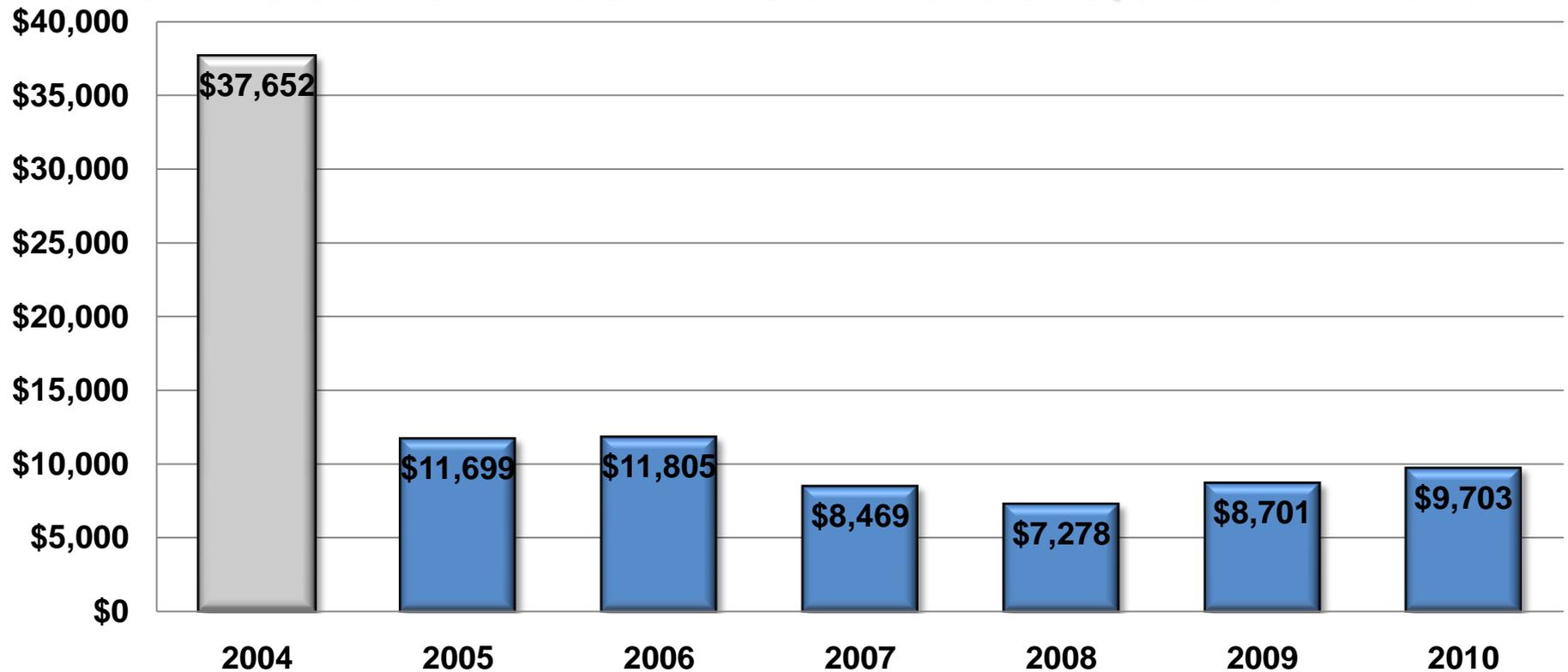


Increasing Hoosier Incomes



• As of 12/01/2010

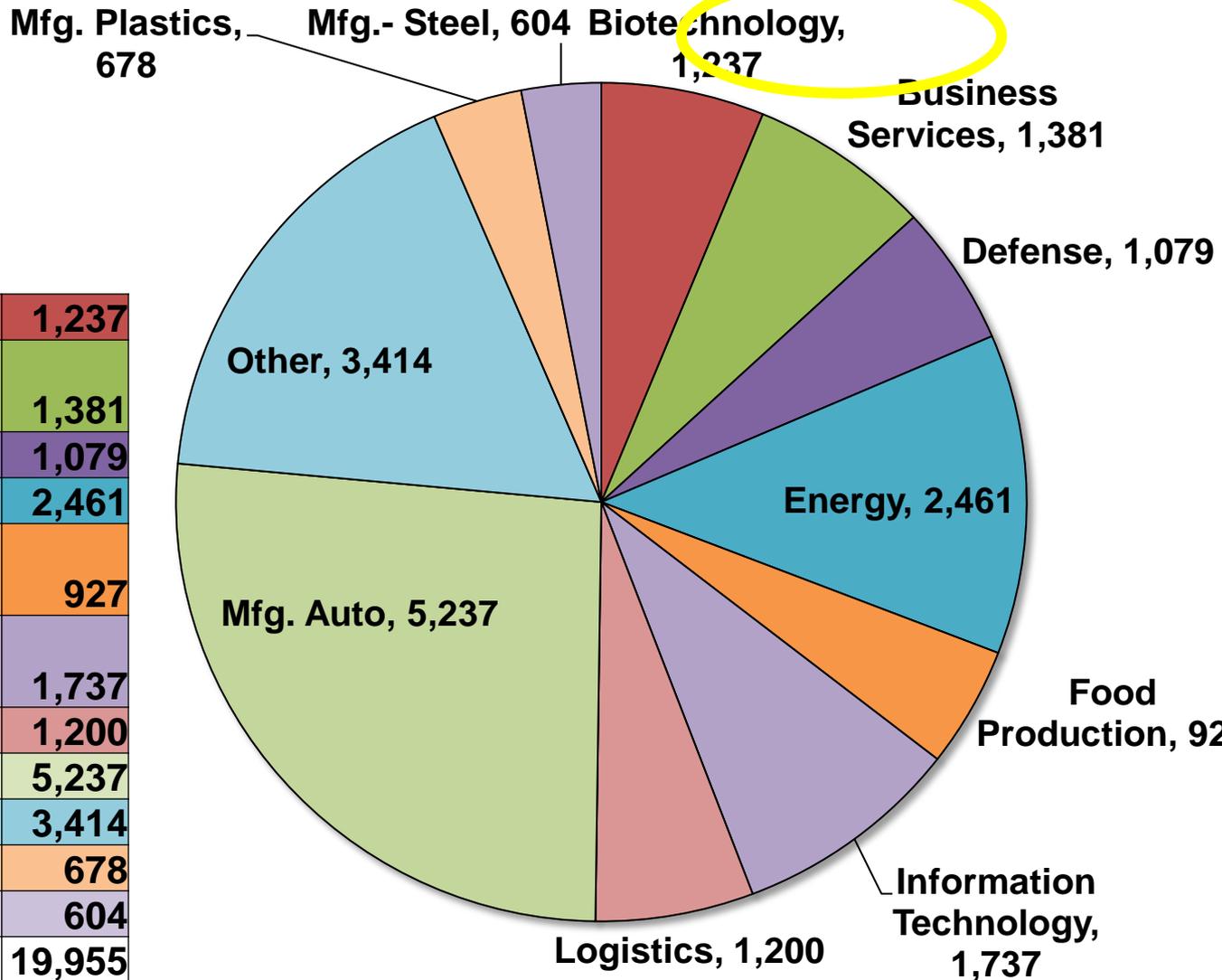
Low Cost of Incentives Yields Quicker Return



- Direct state incentives include tax credits, training grants and infrastructure assistance
- Tax credits are performance-based linked to IEDC certification of new jobs
- Average time of return on investment: approximately 2 years

As of 12/01/2010

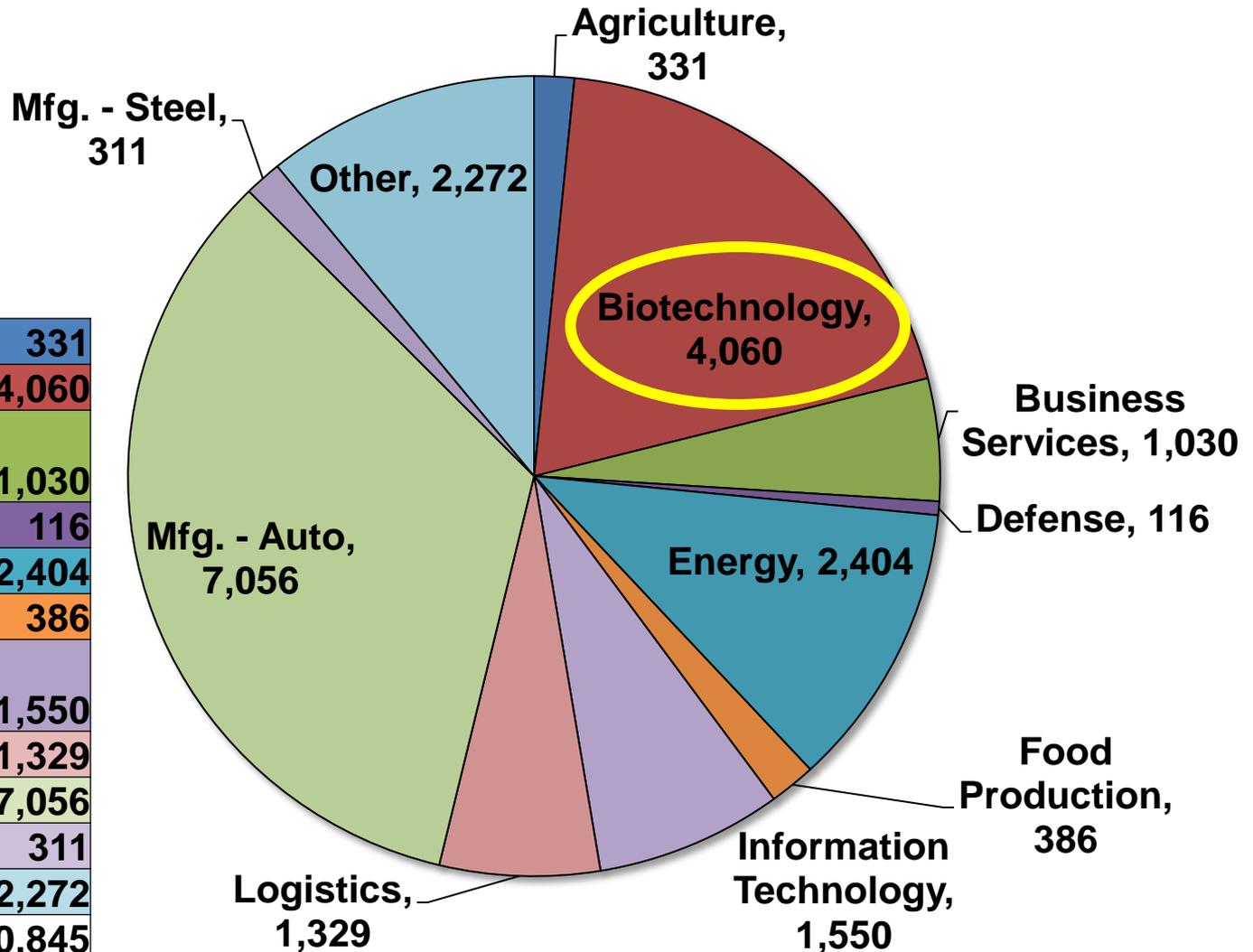
2009 Job Projections by Industry



Biotechnology	1,237
Business Services	1,381
Defense	1,079
Energy	2,461
Food Production	927
Information Technology	1,737
Logistics	1,200
Mfg. Auto	5,237
Other	3,414
Mfg. Plastics	678
Mfg.- Steel	604
TOTAL	19,955

2010 Job Projections by Industry

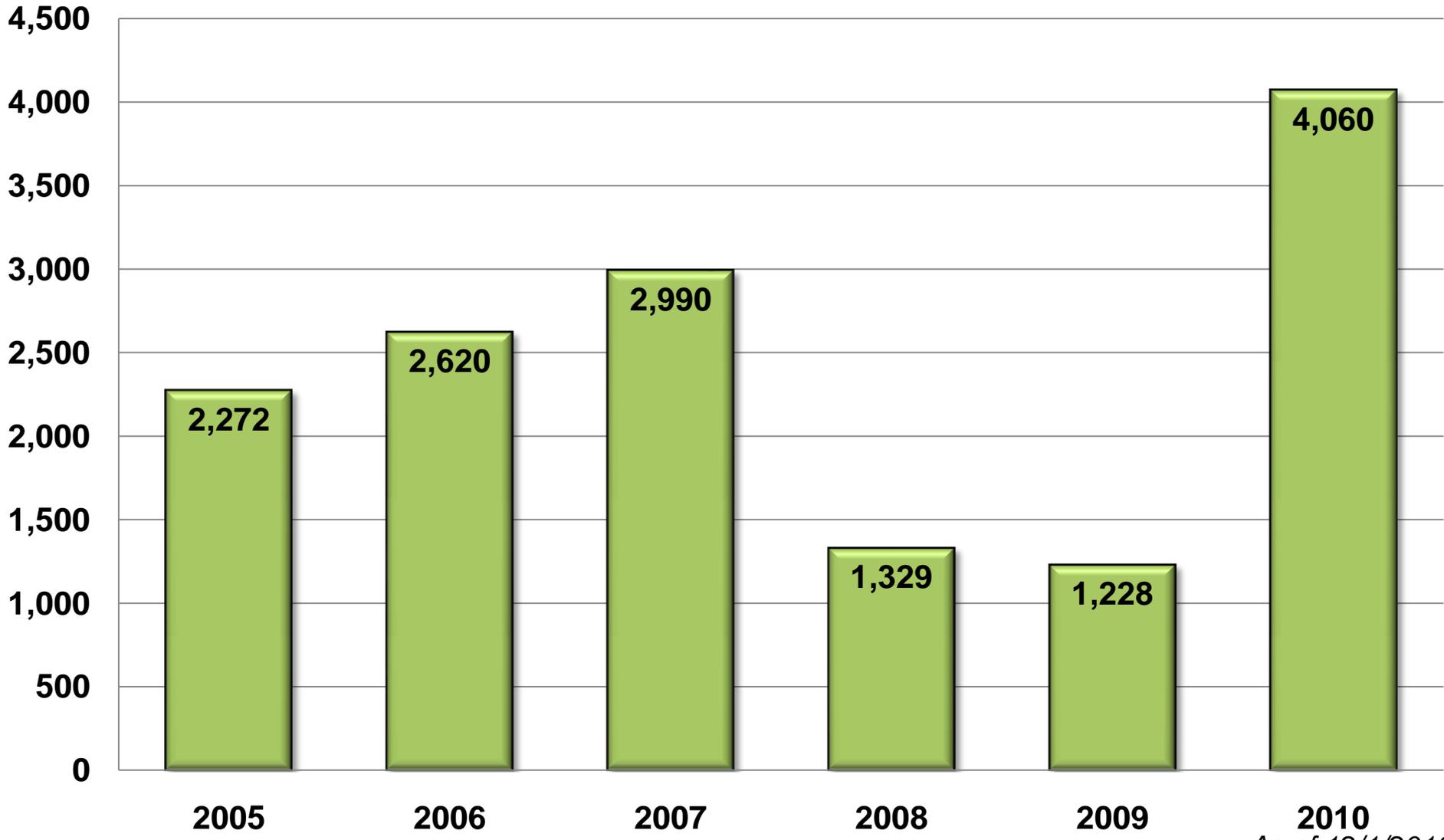
Agriculture	331
Biotechnology	4,060
Business Services	1,030
Defense	116
Energy	2,404
Food Production	386
Information Technology	1,550
Logistics	1,329
Mfg. - Auto	7,056
Mfg. - Steel	311
Other	2,272
TOTAL	20,845



* As of 12/01/2010

12/8/2010

Biotechnology Job Projections by Year

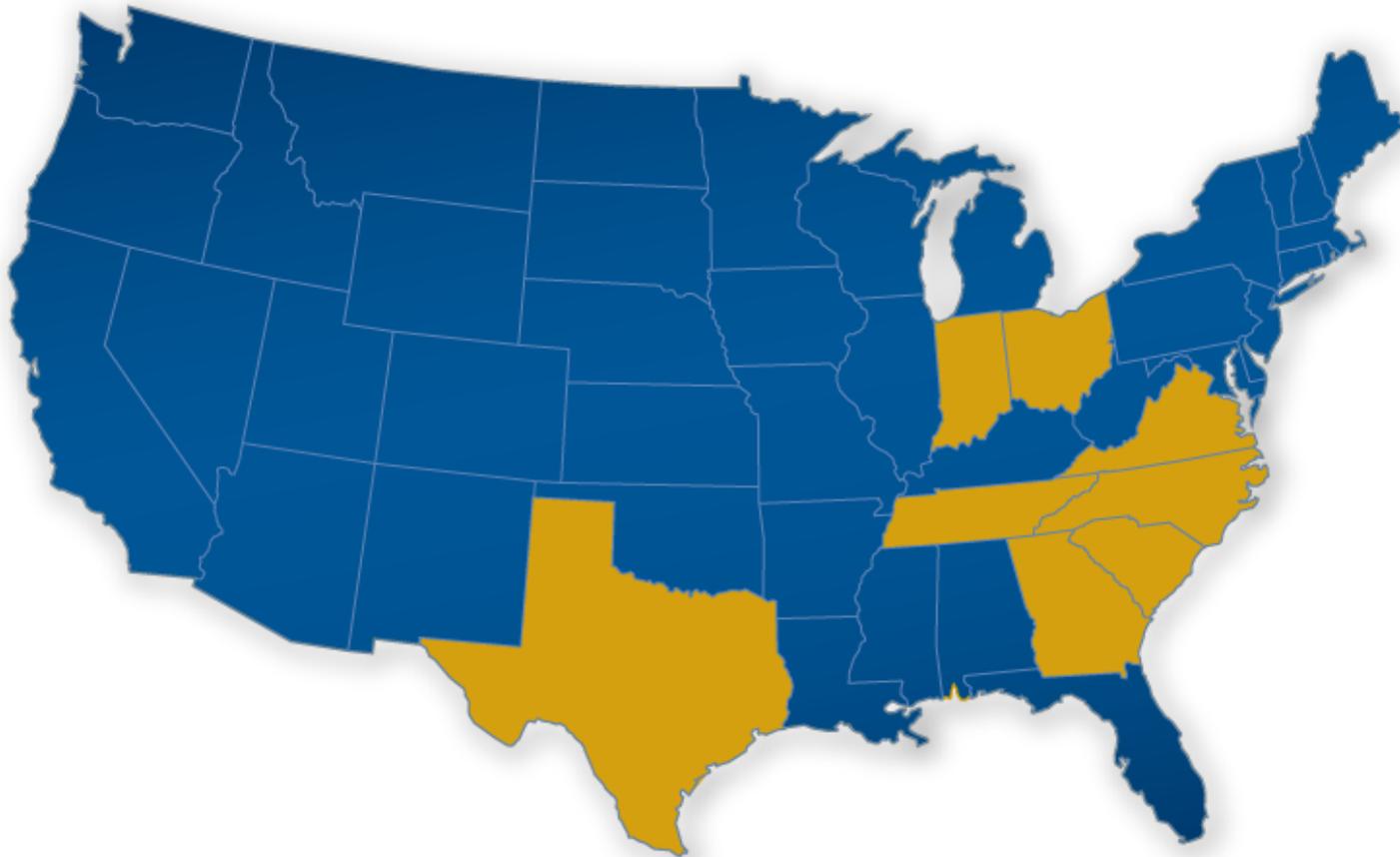


As of 12/1/2010

Strategy Evaluation

Verticals	2009 Projections	2010 Projections As of 11/29/10	Comparison
Biotechnology	1,237 Jobs 11 Projects \$68 Million \$24.84/Hour	4,060 Jobs 21 Projects \$603.5 Million \$26.00/Hour	Jobs: Increase of 229% Projects: Increase of 91% Investment: Increase of 787% Wage: Increase of 16%
Energy	2,461 Jobs 8 Projects \$654 Million \$21.55/Hour	2,404 Jobs 15 Projects \$764.4 Million \$22.49/Hour	Jobs: Decrease of 2% Projects: Increase of 88% Investment: Increase of 17% Wage: Increase of 4.3%
Axle	5,237 Jobs 29 Projects \$228 Million \$17.44/Hour	7,056 Jobs 58 Projects \$842 Million \$17.69/Hour	Jobs: Increase of 35% Projects: Increase of 100% Investment: Increase of 269% Wage: Increase of 1.4%
Defense	1,079 Jobs 4 Projects \$16 Million \$27.03/Hour	116 Jobs 3 Projects \$24 Million \$41.17/Hour	Jobs: Decrease of 90% Projects: Decrease of 25% Investment: Increase of 50% Wage: Increase of 52%

Business Climate Ranks 8th in U.S.



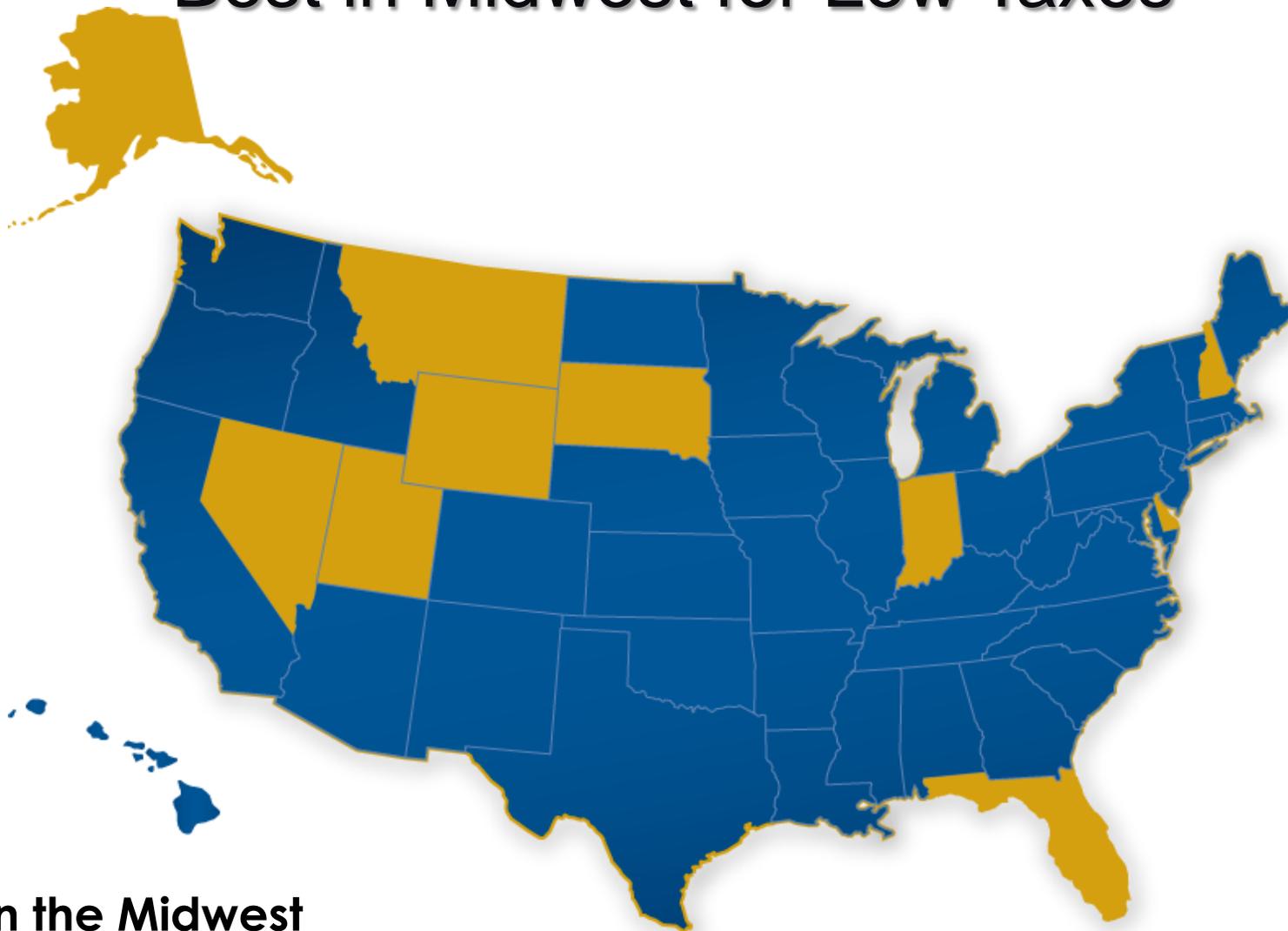
•Based on a survey of real estate executives and Indiana's economic performance

12/8/2010

SITE Selection

Oct. 2010

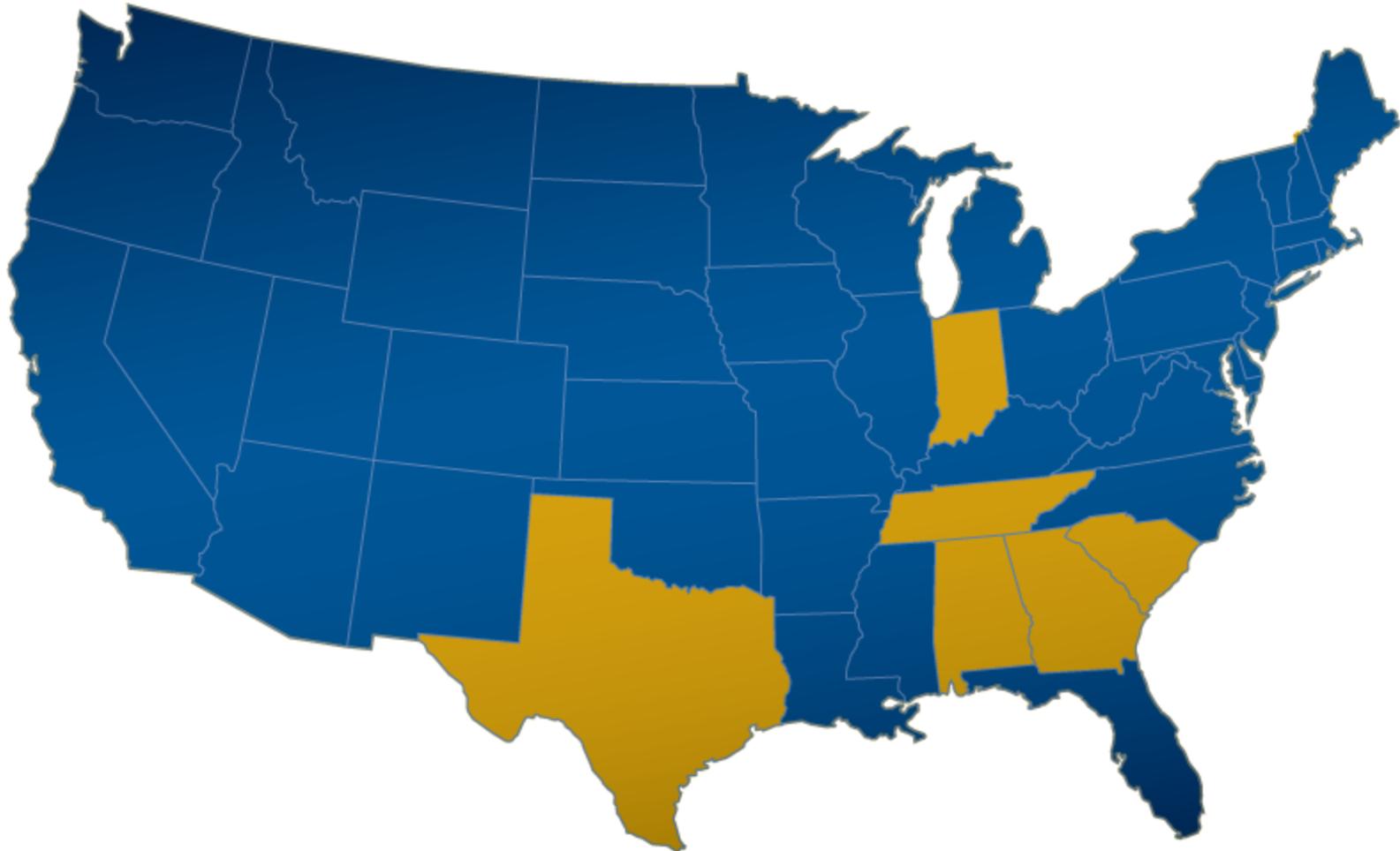
Best in Midwest for Low Taxes



1st in the Midwest and 10th nationally

Illinois (23rd), Kentucky (19th),
Michigan (17th), Ohio (46th)

Top State For Business



- **6th Overall Best State for Business**
- **Based on site selection consultants' rankings of states**



12/8/2010

Source: Area Development magazine, October 2010

Major Q4 Growth Announcements to Date

ACS	300 jobs (Anderson)
Ascension Health	500 jobs (Indianapolis)
Conforce International	175 jobs (Peru)
Cummins	350 jobs (Columbus)
ExactTarget	500 jobs (Indianapolis)
GE	200 jobs (Bloomington)
Nash Finch	100 jobs (Bloomington)
Progress Rail Services	650 jobs (Muncie)
Sallie Mae	350 jobs (Muncie/Fishers)
ThyssenKrupp	160 jobs (Tell City)

Project Win Report

Progress Rail Services

- Diesel-electric locomotive maker, subsidiary of Caterpillar
- 650 new jobs
- \$50 million capital investment
- Project selected Muncie location
- Will occupy ABB building, vacant since 1998

Key Deal Factors

- Infrastructure assistance was key to deal
- Company also cited central location as a major factor in decision



Project Win Report

Sallie Mae

- Loan servicer
- 350 new jobs
- Project selected Fishers and Muncie locations

Key Deal Factors

- Relocation of work from closed facilities in TX and FL
- Part of company's overall consolidation strategy resulting from recent federal legislation

SallieMae®

Project Loss Report

Bright Automotive

- Start-up electric vehicle manufacturer
- 200 new jobs
- \$11 million capital investment
- Plans to move tech center to Detroit

Key Deal Factors

- \$5 M infusion from GM came with expectation of R&D relocation
- Michigan offered \$4.3 M+ in incentives
- Company is still seeking a manufacturing site but is waiting on funding to be secured

Project Loss Report

JD Norman Industries

- Company would acquire and upgrade Indianapolis GM Stamping Plant announced for closure by GM
- 945 new jobs (\$21.96/hr avg wage)
- \$62.5 million capital investment
- Resulted in plant closure and loss of 600 jobs

Key Deal Factors

- Refusal of UAW local to approve proposed wage structure for future workers
- Proposed wage structure was:
 - Supported by national UAW leadership
 - Based on current market reality
 - Consistent with long term viability and competitiveness of the plant

Northwest Indiana Regional Development Authority

Current RDA Priorities

- Emphasis on long term infrastructure development
- Minimal involvement in specific business development transactions

Expanded RDA Priorities and IEDC Alignment

- Emphasis on transaction driven economic development as provided for by Indiana Code
- Focused strategy for pursuing Illinois based companies
- Current RDA Chairman will expand his role to include lead generation and economic development project management

Defense Vertical Update

Indiana National Security Industry Roundtable

- Industry led defense development association
- Mission to enhance industry access and utilization of Indiana's key defense assets - Crane, Muscatatuck, Camp Atterbury
- Long term operations to be funded by industry membership
- Hosted event at Governor's Residence attended by over 50 defense industry executives



Interim Study Committee on Economic Development

- Held four meetings during September and October:
 - Indianapolis (2)
 - Anderson Flagship Enterprise Center
 - Purdue Technology Center
- Heard presentations from business owners, including 21Fund recipients, and economic development and tax experts
- These presentations, combined with discussion among committee membership, guided the committee to adopt 9 findings of fact and 16 recommendations to the General Assembly

Interim Study Committee on Economic Development - Findings

- **Key Findings**

- The 21 Fund has an important economic development role in Indiana
- Commercialization of university-based research is vital to Indiana's economic development
- Indiana's Corporate Income Tax and Personal Property Tax rates are high relative to other states
- Insufficient access to capital for growth companies in Indiana is restricting economic development

Interim Study Committee on Economic Development - Recommendations

- **Key Recommendations**

- Extend the study committee's work through 2014
- Consider providing local governments the option of eliminating or abating personal property tax for new investment and economic development purposes
- Restructure Indiana's Corporate Income Tax rate to improve Competitiveness
- Ensure that workforce programs funded by the state reflect needs of existing industries

Strategic Focus Areas

美国的十字路口

STRATEGIC CLUSTERS 战略集群

STRATEGIC COMPETENCIES 战略能力

	Life Sciences 生命科学	Energy 能源	Vehicles 汽车工业	Agriculture 农业
Research & Development 研究与发展				
Information Technology 信息技术				
Advanced Manufacturing 尖端制造业				
Logistics 物流				

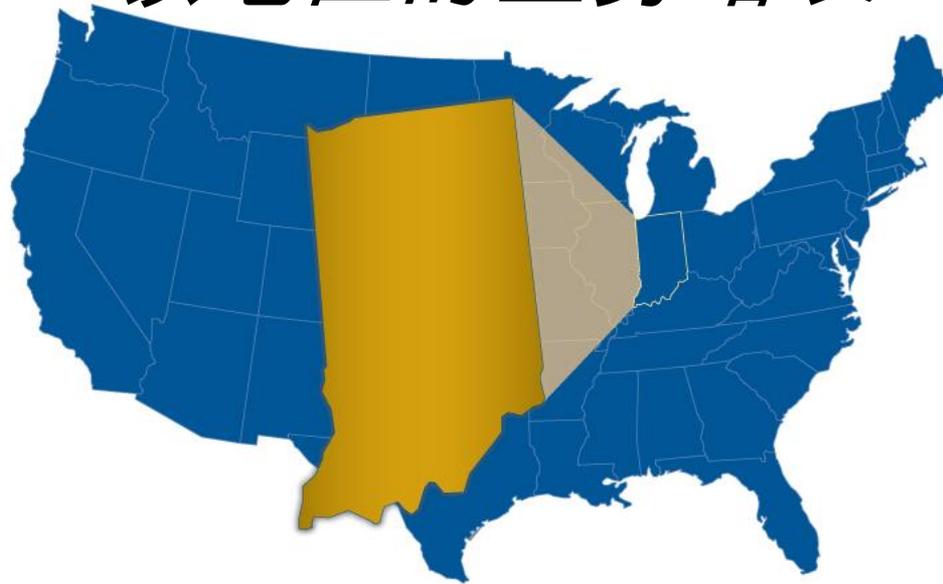


INDIANA AGRICULTURE

印第安纳农业

Business Grows Here

该地区的业务增长



供应能源



12/8/2010



能源



生物学





启动发动机



FOCUS ON EXCELLENCE 致力于卓越

International Investments

国际投资

\$37 billion

IN INTERNATIONAL INVESTMENT

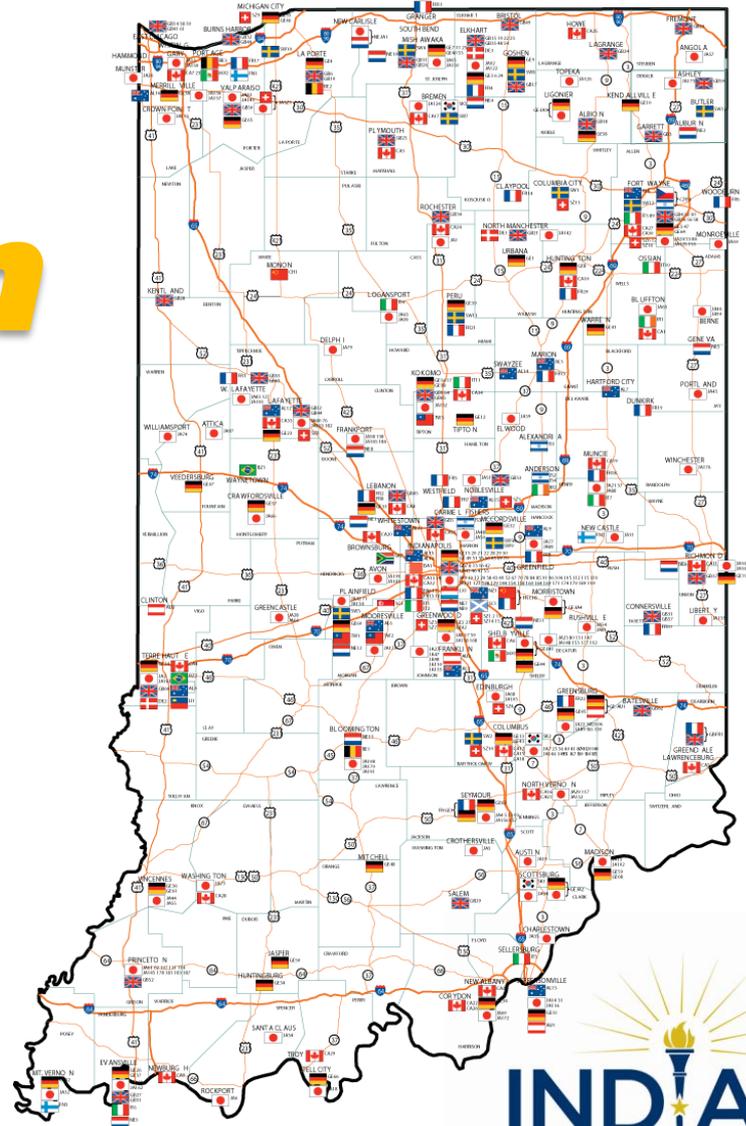
拥有370亿美元的国际投资

&

148,000

HOOSIERS EMPLOYED BY
INTERNATIONAL INVESTORS

并且有148,000印第安纳人
受雇于国际投资者

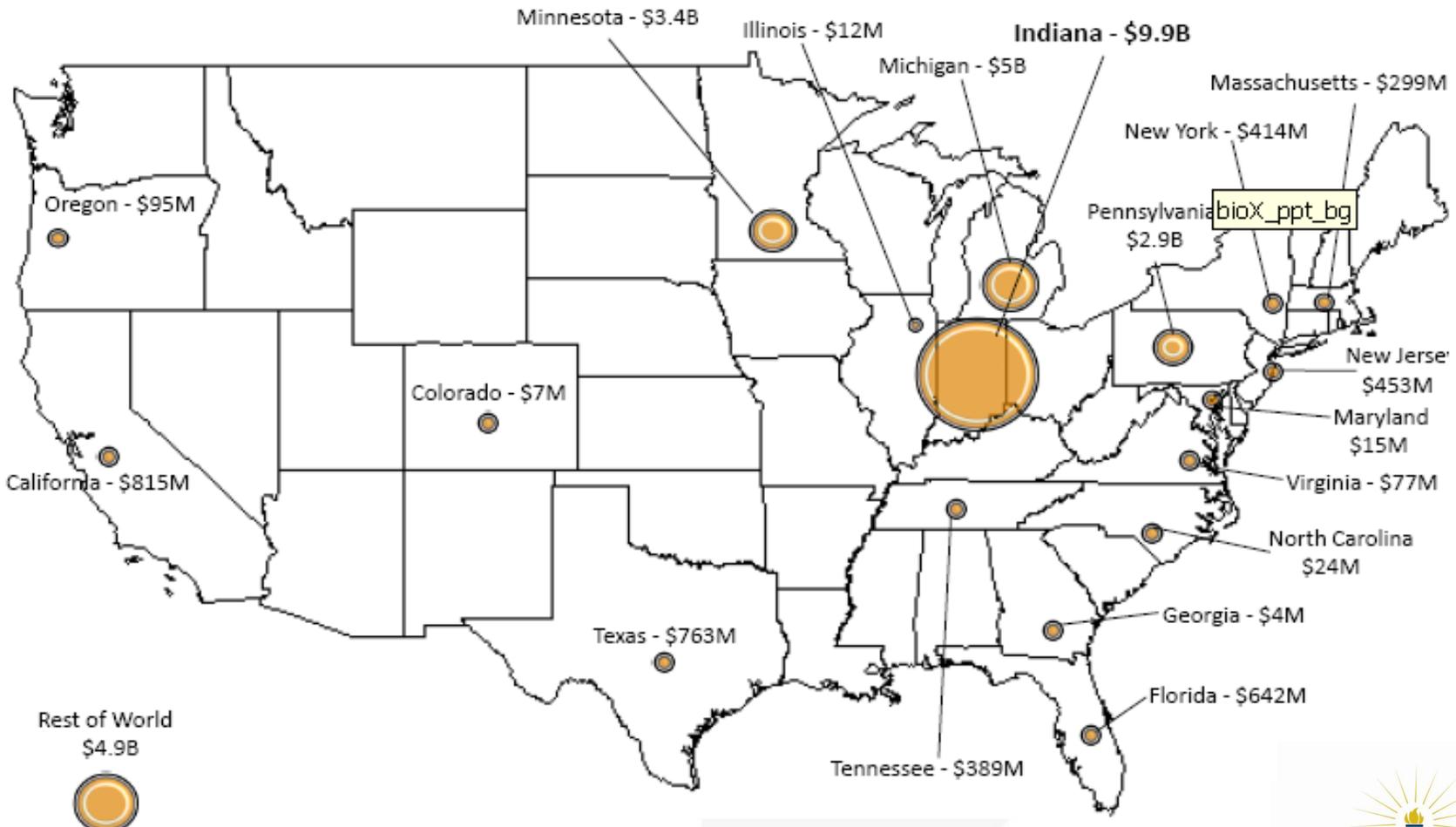


INDIANA
ENGINEERING EXCELLENCE

FOCUS ON EXCELLENCE 致力于卓越

Orthopedics Capital of the World

世界骨科整形术中心



bioX_ppt_bg

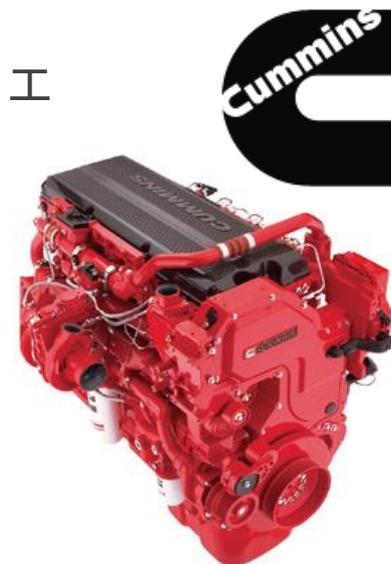
* Data includes Orthopedic Companies with 2007 Sales > \$5MM as reported by Knowledge Enterprises and independent research conducted by BioCrossroads



FOCUS ON EXCELLENCE 致力于卓越

Cummins Engines 康明斯发动机

- Cummins is a global power leader known best for its engines and is headquartered in Columbus, Indiana
康明斯因其世界领先的发动机而全球闻名，其总部设在印第安纳州哥伦
- Cummins employs 17,000 workers in the U.S. and 40,000 worldwide
康明斯在美国有17,000名员工，在全球范围内有40,000名员工
- Products: Engines, Filtrations, Power Generation, Turbo Technologies
产品：发动机、滤清系统、发电、涡轮增压技术
- The company has 26 facilities worldwide and four manufacturing plants in China:
该公司在全球有26处工厂，有4个制造工厂位于中国：
 - Chongqing 重庆
 - Beijing 北京
 - Xiangfan 襄樊
 - Shaanxi Province 陕西省



FOCUS ON EXCELLENCE 致力于卓越

Transportation Infrastructure

交通基础设施

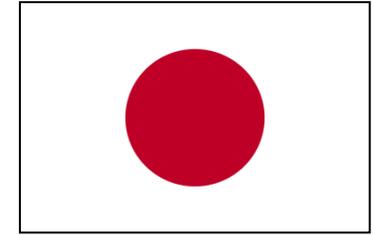
- **Within a half-day's drive of more than 20 major metropolitan markets**
半天车程可达20个主要城市
- **4,165 miles of active railway tracks**
铁路总长约4,165 英里
- **10 airports, 3 int'l**
10个机场（其中3个国际机场）
- **3 int'l maritime ports (with foreign trade zone)**
3个国际港口（带自由贸易区）
- **World's 2nd largest FedEx hub**
世界第二大FedEx物流中心
- **"Best City to Locate a Warehouse" nationally**
被评为全美仓储物流最佳选址地

12/8/2010





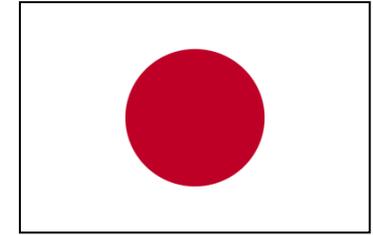
Asia Mission Report



- Second Governor-led jobs trip to China and fifth to Japan
- More than 100 company engagements in China
- 20 positive leads in China
- FDI opportunities:
 - Cummins suppliers
 - Furniture
 - Chemicals
 - Energy (solar/wind/coal)
 - Automotive
- Export Opportunities:
 - Agriculture
 - Beef
 - Hardwoods
- Commercial Collaboration
 - Batteries
 - Pharmaceutical
 - IT
 - Health Insurance



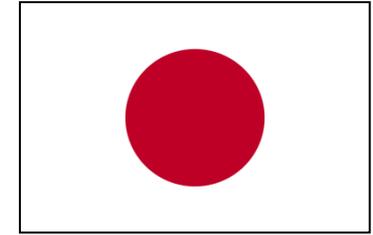
Asia Mission Report



- Some meetings in China include:
 - Techtop
 - Zhengzhou Dongfeng
 - Geely Motors
 - Wanxiang
 - Y.K. Furniture
 - China's largest energy companies
 - China's largest pharmaceutical companies



Asia Mission Report



- Continual relationship building in Japan
- ExactTarget is finalizing a deal that will bring its products to Japan
- Some company meetings in Japan include:
 - Toyota keiretsu (employs 12,000 Hoosiers)
 - Honda
 - Itochu Corp.
 - Fuji Heavy Industries (Subaru)
 - KYB

2011 Marketing Plan

- **Sales trips**

- Dallas Super Bowl (February)
- New York (May)
- Chicago 1 (Summer)
- Chicago 2 (Summer)
- Smaller trips to Atlanta, Greenville, Cleveland, Minneapolis & St.Louis

- **Events**

- Big Ten Men's Basketball Tournament (March)
- Carb Day – Indianapolis 500 (May)
- BIO Show - Washington, D.C. (June)
- Colts Games
- Big Ten Football Championship (December)

- **International**

- India (February)
- China (TBD)
- Europe (TBD)

The logo for the state of Indiana, featuring a white silhouette of the state with a yellow torch in the center, surrounded by yellow stars.

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